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ABSTRACT

A study assessed the activities of five state networks that were designed to transfer experience-based career education (EBCE) ownership to appropriate state and local institutions and to develop a state-level support system for continued implementation of EBCE in local districts. Focus of the analysis was on factors contributing to EBCE entry, statewide coordination of EBCE, brokerage, planning assistance, demonstration, training, and evaluation. Also examined were various issues relating to developing a functional network, including coordination and management, key leadership features, institutional support for EBCE, and communication and linkages. Data showed that the state networks studied were clearly successful in increasing educators' awareness and interest in EBCE learning approaches. However, they were less successful in setting up a long-term EBCE state training capability. Analysis of networks in the five states resulted in recommendations calling for development of a simple training model that provides a way to bring new trainers into the system as experienced ones leave as well as for development of a system of recognition and reward to provide incentives for individual participation. Network designers were also urged to strongly advocate EBCE in the districts augmented by active state coordinators. (MN)

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MAKING AN EDUCATIONAL INNOVATION STICK:

Building State Networks to Support Experience-Based Career Education

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of the
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Northwest Regional Educational Laboratory
Education and Work Program
Larry McClure, Director

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Larry McClure

Program Director

AN INTRODUCTION TO EBCE STATE STRATEGY

EBCE: A Major R&D Effort

Experience-Based Career Education (EBCE) is a major national demonstration project geared to developing and testing an alternative educational program for secondary students. Its focus is on integrating academic learning, career experiences and life coping skills by involving students in direct learning experiences in the community. Begun in 1971 and sponsored by the National Institute of Education (NIE), EBCE has been developed, tested and then replicated through four regional educational laboratories--Appalachia Educational Laboratory, Far West Laboratory for Research and Development, Northwest Regional Educational Laboratory and Research for Better Schools, Inc.

Working from a set of common guidelines, the laboratories evolved four distinct EBCE models. Each, however, encompassed several essential characteristics central to all EBCE programs. These were:

- Programs involve community sites as the locus for student learning experiences.
- EBCE is student centered and program activities are individualized to meet each student's career and academic needs.
- EBCE integrates academic learning with career learning.
- Programs involve both college-bound and vocationally oriented youth and provide a direct means of preparing them for the choices and responsibilities of adulthood.

By 1975, EBCE pilot programs under the sponsorship of the four laboratories were established in several states across the country. The viability and quality of EBCE was proven. But NIE and the regional laboratories were also vitally interested in EBCE becoming a long-term educational alternative firmly institutionalized in state and local districts. For this to happen it was imperative to transfer the capability to install EBCE programs from regional laboratories to state and other education agencies whose mission is to provide leadership and support to ongoing curriculum and instruction, including teacher pre- and inservice.

State Networks: A Dissemination Strategy for EBCE

State strategy networking was conceived by NIE and the collaborating laboratories as an effective way of transferring EBCE ownership to appropriate state and local institutions and developing a state level support system for continued implementation of EBCE in local districts.

For NIE and the original program developers, state networks offered the most promising approach for assuring that this carefully developed educational innovation would be disseminated and implemented well beyond the original period of federal funding. The plan for a comprehensive EBCE network involved the following:

- The regional laboratories would transfer their EBCE training and technical assistance capability to state-developed cadres of trainers, thereby creating long-term local support for the educational innovation.

- The development of a coordinated state training and information network would provide essential statewide support for the continued dissemination and implementation of EBCE.

- The state network would link important state educational agencies--colleges and universities, state departments of education and intermediate education districts--for the purpose of delivering EBCE program information and training.

The development of state networks has had twofold importance for NIE and Experience-Based Career Education. On one hand it was a solution to an immediate problem--namely, making certain that human resources for EBCE dissemination would exist as the regional laboratories phased out of providing extensive training and technical assistance nationwide. In doing this the developers of state strategy considered it vital that the support for EBCE be integrated into state educational agencies rather than located outside of the state. The rationale for this was that continued EBCE implementation would require critical state agencies to stand behind the proposed practice with planning resources (including interpretation of state regulations), training capabilities and visible encouragement. From the beginning, NWREL acknowledged the importance of state involvement and stressed that effective long-range installation cannot hinge on operational subsidies alone, but rather must be supported by technical assistance and official sanction from key state agencies.

That second important aspect--something beyond money and materials--was a more inclusive challenge. It addressed the issue of effectively transferring ownership and continued interest and commitment for a nationally developed educational innovation to state educational institutions. Since these agencies hold primary responsibility for helping local communities strengthen educational practices, it is vital to find methods for involving state education agencies (SEAs) and local education agencies (LEAs) in utilizing the results of educational research and development.

Thus, issues of concern behind developing this strategy were:

1. How can we most effectively disseminate a nationally developed and thoroughly tested educational innovation to local practitioners?

2. Can we devise a way of successfully linking several state agencies to deliver EBCE training and implementation services within a state?

3. Will a carefully formulated state strategy, which clearly identifies agency roles and responsibilities, be a way of institutionalizing EBCE, i.e., assuring that it is incorporated into the ongoing services of state agencies?

A major underlying concern, then, in establishing a state strategy system was whether or not state networks would be a successful long-term mechanism for disseminating a nationally developed educational innovation.

Framework for This Report

The purpose of this report is to assess what actually happened in a representative group of state networks and to answer the following questions:

- What kinds of strategies did states develop to advocate EBCE, to implement new programs, to incorporate EBCE into the state's educational system, and to develop a skilled cadre of state EBCE trainers?

- How did functioning state networks compare to the networking plan initially envisioned by NWREL, i.e., what was the relationship between theory and reality?

- What is the current status of networking in these states and what issues seem critical for the success of networking?

In this paper, significant developments in the states are examined in relation to the major networking components proposed at the outset: brokerage, planning assistance, demonstration, training and evaluation. The report also looks at a number of additional issues that relate directly to developing a functional network--coordination and management, key leadership features, institutional support for EBCE and communication and linkages. Finally, it concludes with some generalizations about state networking, based on the experiences of five typical states. Although each EBCE pilot state is striving to have broker, demonstration, planning, training and evaluation capabilities in all four EBCE models, this report focuses on five states' capability to disseminate only the

NWREL model. We have made this choice because we have the most complete information on NWREL components and because the report is concerned primarily with processes for developing a state network, rather than a comprehensive profile of each state's multi-model EBCE capability.

THE STATE NETWORKING MODEL: RELATIONSHIP BETWEEN THEORY AND PRACTICE

The state strategy model that NWREL developed in collaboration with NIE carefully incorporated some of the essential components recognized by current dissemination theory. It built in provisions for developing local ownership, for mutual program adoption, for using a personal intermediary to communicate program philosophy and content and for providing a comprehensive support and consultation service, all of which are currently considered to be critical elements in successfully promoting the utilization of educational innovations by local schools.

Definition of Model Components

The original EBCE state strategy network outlined by NWREL contained these essential elements for a comprehensive state network:*

1. Entry Strategies--identification of incentives for both individual and institutional participation in a statewide network.

2. Commitment--provision of the financial and human resources to--
   a. assure that identified individuals in the network categories listed below have the necessary released time to become knowledgeable about EBCE, as required by their various network roles.

   b. facilitate the travel necessary for these individuals to become trained.

   c. acquire the necessary support materials.

3. Linkage--the availability of a person or persons within the state to be responsible for overall coordination of the effort, correlating and relating the individual parts of the network and describing that network to others. Without someone designated for this essential role, the various elements of the plan may come "unglued" and fail to function harmoniously.

*From How A State Might Work to Institutionalize EBCE (Draft) NWREL: Portland, Oregon, January 1977.

4. The identification of individuals within the state who can and want to function effectively and efficiently in the following roles:

   a. Brokerage

      - explaining EBCE, making informational presentations on the various models and having sufficient knowledge of EBCE to recommend it as a viable means for delivering education.

      - providing "psychological" support and encouragement to those who undertake to set up EBCE programs.

      - helping districts assess needs, interest and/or commitment to EBCE and then helping them select the EBCE model and/or strategies most suitable for their district.

      - putting districts in touch with actual resources (names, schedules, telephone numbers, etc.) for their next steps (planning, training, implementation and evaluation).

   b. Planning for EBCE Installation--assisting local schools in preparing to operate an EBCE program, including dealing with issues such as transportation, insurance, recruitment of employer and community sites, selection of students and staffing.

   c. Demonstration Sites--existence within the state of operational EBCE programs that can demonstrate one or more EBCE models to others (ideally all four models--AEL, FWL, NWREL, RBS--would be represented in each state).

   d. EBCE Staff Training--assuring the availability of qualified individuals who are well prepared to train local staff to operate an EBCE program.

   e. Evaluation--in-state capability to help individual EBCE programs evaluate their effectiveness for local, state and national purposes. This is important for those who operate EBCE programs, those who train staff for various roles in EBCE and those who disseminate EBCE information.

The question of who could or should be involved in filling each of these functions is critical. NWREL contends that each state will have to identify individual(s) or groups who can perform these functions in a way that fits the state's own setting, since the states have differing educational structures and patterns of influence. The overriding purpose of state strategy, however, was to design and develop a comprehensive network within each state that fully institutionalizes the ability to implement EBCE on a continuing basis within that state.*

*From EBCE Implementation Prospectus, NWREL, 1975.

Scenario of an Ideal Network: How NWREL Thought It Would Work

The following brief scenario illustrates how NWREL envisioned the interrelationships of components in a comprehensive state network.

> "NWREL's involvement with State A begins with the State Department's successful application for Vocational Education Act Part D funding of an EBCE pilot program. The state career education director sees EBCE as a significant opportunity for his state and assume a major role in promoting EBCE by opening doors at the university level for training and constructing a strategy by which four potential demonstration sites will be started through Part D funding. He has already performed the functions of state brokerage among LEAs by sharing information, assisting districts in assessing their needs and helping them plan for development of options.
>
> For the next year four demonstration sites will be developed through Part D monies matched with contributions by the LEAs. LEA staff members will be the major participants in an EBCE training network. In addition, the state's career education assistant director will be responsible for developing a coordinated cadre of trainers and a planned approach to disseminating information about EBCE to local districts. Finally, an evaluator from the local university will be trained to evaluate student and program outcomes for all EBCE endeavors within the state.
>
> NWREL believes that the existence of entry and strong individual elements is a necessary but not sufficient condition for a healthy state EBCE network. What makes it all work is the information that various elements have about one another and how efficiently that information gets communicated to the potential adopter."*

In summary, the purpose of state strategy was to build a coordinated EBCE state network responsible for advocating experience-based learning strategies, implementing new programs, developing a cadre of state trainers and institutionalizing EBCE into ongoing state educational structures. The next section of this paper examines how five states actually developed a coordinated state network and devised methods for brokering, planning, demonstrating, training and evaluating local EBCE programs.

*Adapted from the FY77 Operating Plan for the Experience-Based Career Education Program. NWREL, July 1976.

STATE STRATEGY IN ACTION: A LOOK AT FIVE STATE NETWORKS

Characteristics of Five Representative States

The five states selected for analysis in this paper can be grouped into three categories. In the first category are two out of the four original "first-round state strategy states." These states applied for and received NIE funding in 1976 to develop a model state network that would show how states can be effectively involved in long-term EBCE dissemination. As a group they received maximum support for developing a model state dissemination system. The NIE grant provided for network development, for hiring staff, developing appropriate state EBCE materials and for carrying out EBCE dissemination activities. In addition these states had strong state department support to advocate EBCE programs.

The second category of states selected for this sample are "second-round state strategy states." Like their predecessors, these submitted a written request to NIE to establish an EBCE state strategy network. Unlike the earlier state strategy states, however, they did not receive a grant to implement their program, nor were they provided monies to staff the coordinator's role. They did, however, receive free technical assistance from all four of the laboratories engaged in EBCE development. Similar to the previous category, these states were encouraged to create state department leadership in developing a networking system, in establishing a cadre of trainers, in organizing a dissemination effort and in making EBCE a visible educational alternative for local districts.

These two groups of states, then, represent "top-down" dissemination efforts. The third category differs specifically from the preceding in that it was a "grass roots" movement organized by local EBCE staff members. Initially it had neither the sanction of the state department, of education nor a centralized base for development. It differed substantially from the theoretical state strategy model. The network was not initiated by state department directives; it had no state-level staff person to coordinate the effort. What it did have was a state network functioning from a local base, using local staff to put together an EBCE brokering system and a viable dissemination strategy.

Briefly then, the five states analyzed for this report have the following characteristics:

Category I - First-Round State Strategy States (States A and B)

- funded with NIE money in 1976 specifically to develop a network
- state department initiated planning and training effort

- a funded coordinator located in the state department
- written state plan for EBCE training and dissemination

Category II - Second-Round State Strategy States (States C & D)

- no specific funding to establish a network
- free technical and training assistance in EBCE
- coordinators assigned but not necessarily with EBCE dissemination as their central job task
- written state plans for EBCE training and dissemination

Category III - Independently Developed State Strategy (State E)

- a grass roots activity
- no central coordination in the state department
- no assigned network coordinator
- no funding

These three categories and the differing conditions in the respective states offer us the opportunity to ask and answer (not necessarily conclusively, however) a number of questions about organizing an effective dissemination network:

- Are there advantages to a state-initiated network and if so, what are they?
- Is funding a necessary ingredient (How does funding make a difference in helping a network work?)
- What kind of training networks did these different states develop and how well do they appear to be functioning?
- Did the networks developed resemble or differ from the proposed model?

A Look at the Real Thing

Factors Contributing to EBCE Entry

Incentives

In examining the dissemination path of EBCE as an idea and program, a question that readily comes to mind is what appeal did EBCE--a nationally

developed educational innovation--have for local state administrators and planners? Equally intriguing is finding out how state educators found out about EBCE and why they were willing to participate in a major and potentially time consuming dissemination effort. Answers to these questions appear to lie partly in the educational climate of the '70s and partly in specific events.

First it is hard to overlook that career education has been a major educational priority for this decade. As a program it introduces students to real jobs and responsibilities, providing a more realistic awareness of work and the decisions leading to finding as fulfilling a career as possible. Most state departments hired career education directors, who were flooded with information on major program approaches to providing career education--including infusing it into existing classroom activities and using the community as a base for learning. As state directors wrote career education plans and spelled out objectives for the state, monies to support activities became available from national sources. Career education was, in other words, part of the education scene and had acquired, in many states, top priority status.

It is within this context that a number of specific events further propelled career education directors toward involvement with EBCE. In the spring of 1976, collaborative planning between the U.S. Office of Education and NIE resulted in EBCE being designated as an exemplary program. Three-year demonstration grants under Part D of the Vocational Education Act (VEA) were announced. Subsequent to these requests for proposals, RFPs, NIE also issued an RFP to states interested in piloting the state EBCE network concept which paralleled NIE's increasing interest in effective dissemination approaches for local educators.

The announcement of VEA-Part D grants in the early fall of 1976 contributed substantially to increased state agency interest in EBCE. In each of the five states being analyzed here, VEA-Part D monies were used to fund at least one EBCE exemplary program. EBCE, to this time a pilot and demonstration project sponsored by four regional laboratories in 20 local districts, suddenly burgeoned into a highly visible national effort with sites in 49 states plus the District of Columbia, American Samoa, Guam, Puerto Rico and the Virgin Islands.

But apart from national visibility, many state career education directors began to see EBCE as a means of meeting some of their states' own specific career education objectives. Proposals from the four pilot state strategy states all underscored EBCE's value in achieving these state objectives. In each instance, moreover, an influential educational decision-maker and planner was also vitally committed to accomplishing state career education priorities and saw EBCE as a means of doing so. In these states the active commitment of at least one SEA administrator was a necessary ingredient for promoting a networking system in the state educational hierarchy.

At the outset, then, these factors seem to be important ingredients in the successful movement of EBCE from research status to SEA interest and involvement:

- EBCE had become a nationally visible educational innovation.
- Funding through VEA-Part D monies provided immediate incentives to develop EBCE sites.
- EBCE was viewed as a viable means of meeting existing state educational objectives in career education.
- An influential educator was committed to identifying and implementing programs that would meet state mandated objectives in career education.

Another important factor that promoted entry was the thorough development, evaluation and documentation processes used for EBCE. EBCE was a "ready made" program, easy to replicate. EBCE laboratory developers could provide interested educators with detailed training manuals, audio visual presentations, competent staff trainers and demonstration sites open to visitors. As a "ready made" innovation with four variations* on a single theme--using the community as a primary learning resource--it not only saved states from a costly and lengthy planning effort but it provided a selection of strategies that could be adapted to local needs.

It is also worth noting that in at least four of the five states under scrutiny, the SEA took a strong leadership role in promoting career education throughout the state system. In one state, for example, a State Career Education Law mandated collaboration between state and local agencies to install career education (CE) in all local school districts. In the fifth state, which lacked initial state department leadership in the EBCE effort, the university played a strong role in encouraging and fostering a networking system although the actual leadership function was carried out almost exclusively by local EBCE staff members.

In reviewing the reasons for entry it is important to recognize that these states had already established a strong base for career education either in the state department or the university. It is also clear that the availability of Part D funds and the establishment of funded EBCE programs within the state provided considerable incentive for acceptance of EBCE at the state department level and also potentially for involvement in state networking.

Leadership

Since leadership can be as critical as project design itself, the question of who took the lead role in establishing state strategy across the five representative states is important to this study. Did, for example, leaders emerge from the SEA? What previous connection, if any, did they have with EBCE and career education? What characteristics or styles or situations facilitated their success?

*Each Laboratory model differed somewhat in the approaches and major program components for its respective EBCE program.

Initially, planners of the state strategy model thought it would be critical to assign an existing state department staff member to the state network position. However, of the four states with active state department leadership, three hired coordinators from outside the agency to fill the position while only one added the responsibilities to an existing state education department staff member's role. The three states that hired an "outside" coordinator had very positive results in the development of state strategy. From these outcomes, it appears that state department acceptance and promotion of a program is not necessarily dependent on using existing staff. Either way, these factors seem important:

- The existence of a state department full-time administrator who, although not necessarily directly involved in the project, provides consultation, advice and department support for the project.

- The hiring of coordinators for the state strategy position who are familiar with the workings of the state department (and regional service districts) and who have a credible track record in some aspect of the educational system.

- The state coordinator's familiarity with career education concepts and programs and strong interest in the idea of using the community as a viable learning resource.

Moreover, in reviewing the selected states at hand, it appears that strong SEA-directed networking was an outcome of having an individual directly and solely assigned to state strategy tasks. The strongest networks seem to be in states where the coordinator was specifically funded to do EBCE state strategy and freed from other responsibilities. In the developmental stages of networking, the funding acquired by first-round states helped considerably in establishing a strong base for EBCE state strategy. This, plus the hiring of competent individuals with strong leadership characteristics, helped pave the way for a more integrated and thorough networking plan.

Conversely, however, access to federal funds to initiate a program often results in program termination when funds are withdrawn. In the three states with individuals in funded positions, only one state coordinator was retained with alternative funding when the federal money ran out. In the other two states, strategy responsibilities have now been added onto the tasks of an existing SEA career education staff member. The continuing SEA willingness to maintain a structure for state strategy does infer institutionalization of the innovation, i.e., having it absorbed into the existing structure and consequently losing its demonstration status. It is, however, too early to discern whether these newly assigned staff will vigorously advocate further development of EBCE and work toward maintaining a training capacity or assume a relatively passive role.

In one state that had some difficulty in creating a "top-down" strategy, the following situations occurred and were instrumental in hindering development of a strong network:

- State strategy tasks were added onto the existing responsibilities of a state department staff member and despite some modification in work load to accommodate the new program, EBCE state strategy was one of many, not a priority, responsibility for this person.

- Several individuals were assigned responsibility for state strategy over the course of a fairly short time period. This "changing of the guard" interfered with any one person identifying him/herself with EBCE state strategy and viewing it as a primary program emphasis.

- The climate of the state department, although strongly supportive of career education, had a far greater commitment to infusing CE into the curriculum than to using the community as a major learning resource in the process.

Although this does not represent a complete analysis of the organizational factors that hindered development of EBCE state strategy in this particular state, it does give a perspective on elements that can be divisive and unsettling. One can that the combination of a lack of clear task identification, no real assignment of leadership, minimal EBCE support within the hierarchy, and the absence of money to carry out the planning for a new program posed significant obstacles to the entry of EBCE into this state.

Coordinating EBCE Statewide

The state coordinator's role hinges on creating and embellishing the SEA's commitment and local districts' interest in EBCE as an educational delivery system. To do so requires that the coordinator develop and manage an effective information and training network. Carrying out that task calls for skill in tapping both formal and informal networks to increase the visibility and promote the viability of EBCE as an educational innovation.

From the experiences represented in these five states, it is apparent that effective network organization and management can occur with either state or local level leadership. For purposes of assessing our strategy model, however, we will focus primarily on EBCE coordination at the SEA level. The state strategy model argued that the long-term impact of EBCE would best occur if the state department made a firm commitment to the program and moved toward institutionalization within that organization. This section, then, looks at what coordinators considered to be essential tasks in maintaining an effective network and in developing a constituency for EBCE both within and outside the SEA.

For the state coordinators, essential organizational tasks in creating a network involved--

- Becoming the primary advocate for EBCE which included establishing necessary support and coordination services and offering practical and immediate planning assistance to local districts implementing new programs.

- Creating an institutional awareness and acceptance of EBCE at the chief state school office level and taking the necessary steps that would lead to institutionalizing EBCE and building it into long-term, state-wide education planning.

- Preparing a cadre of EBCE trainers with technical training capability in EBCE program development and planning.

Establishing a working network required maintaining a balance between administrative and grass roots activities. Generating interest at both levels was a prerequisite for achieving the major payoff for EBCE networking--namely the creation of new operational EBCE programs. The basic activities that coordinators carried out to promote EBCE at both the state and local level were--

1. awareness presentations on EBCE (for school staff, administrators, school board representatives, parents, state and regional educational specialists)

2. development of linkages with key staff members within the state and regional educational agencies to allow for broad based participation in EBCE planning and dissemination

3. provision of direct planning and training assistance to local EBCE sites

4. development of state information and planning materials to promote the effective administration and coordination of EBCE

5. implementing EBCE on a pilot basis in a small number of schools

6. arranging for an EBCE evaluation process to determine and improve the effectiveness of programs in each pilot site.

These tasks were aimed at generating a solid base of understanding, support and direction for EBCE implementation and providing the assistance required to establish new programs. A lengthy log of activities maintained by one state coordinator illustrated the diverse number of contacts in one state that contributed to forming a solid constituency for EBCE.

While the state coordinator must be an effective agent in creating support for EBCE, the short- and long-range success of the effort depends greatly on a positive climate in the state department and rests upon the SEA's willingness to allocate both institutional and human resources to the effort. In all four states with a centralized EBCE network, the SEA provided facilities and logistical and supervisory assistance to the state networking coordinator and tied the network directly to the state's existing organizational structure. In three of the states, the coordinator functioned directly out of the career education division of the state department; a fourth was housed in offices of the State Board for Community Colleges and Occupational Education but also maintained direct ties with the State Department of Education. In three states, the EBCE coordinator reported directly to the career education director who retained overall responsibility for the network project. Through close collaboration with the career education directors and, in some instances, also "in kind" time commitment by them to the project, EBCE networking was further reinforced. It was closely aligned to an organizational structure that offered credibility for the innovation; it was able to draw upon substantial information resources and funding possibilities in other agency departments; it acquired flexibility for training and dissemination activities; it had easy access to communications services (newsletter, mailing lists, etc.); and it had a ready tie to curriculum specialists and trainers such as those in regional service centers who could promote EBCE.

In summary, then, the SEA accomplished several important state level objectives vital to EBCE acceptance and development. These included--

- Assuring that EBCE was built into the state career education plans
- Identifying potential funding resources in the state that could be used to aid districts in implementing an EBCE program and getting this information out to sites
- Utilizing any existing dissemination networks such as the National Diffusion Network, regional service center staff, state newsletters or publications that could expand EBCE's contact with the educators,
- Developing needed informational and curriculum products to aid in providing visibility for that state's EBCE effort.

Coordinators in all five states sought communication channels that would promote the EBCE concept within their state. This involved establishing linkages with groups that were strong promoters of career education, participation in career education advisory committees, coordination with the National Diffusion Network sponsored by U.S. Office of Education (USOE) and collaboration with regional service district staff. In each state a different assortment of linkages proved to be instrumental to

EBCE development. The coordinator's ability to identify key resources that could reach local districts and generate interest was a critical factor. In one state establishing a strong cadre of EBCE trained regional service center staff was the key in providing an ongoing base for EBCE advocacy; in another, an attempt to establish a similar training network met with minimal success.

All but one state in this group have also established their own EBCE information system, as well as coordinating their efforts with existing systems. All states use newsletters to share EBCE information with educators and other interested publics; these newsletters are either EBCE specific or include news about statewide career education as well. States have also developed descriptive brochures explaining EBCE and identifying state coordinators, slide presentations to introduce EBCE as it is operating in that respective state and a variety of localized curriculum materials. Coordinators saw the development of these materials as an important way of publicizing EBCE as it is being implemented in their state.

Brokering: The Key to Visibility

Although coordination and management of a network may be essential to keeping the system together, it is the functional elements of EBCE state strategy (e.g., brokering, planning, training, demonstration and evaluation) that help establish and maintain local EBCE programs. In all state networks, brokering EBCE has been a primary network activity. In our representative states brokering has involved creating statewide awareness of EBCE, providing introductory information on EBCE programs and learning strategies, and coordinating planning and training assistance to interested districts. Those who act as EBCE brokers have needed to be well versed in the EBCE models, able to assess local needs and suggest appropriate EBCE programs, skilled in demonstrating EBCE processes and familiar enough with EBCE programs to suggest variations and adaptations to interested educators.

More specifically, a NWREL concept paper elaborated the following services that state brokers were encouraged to provide:

1. Information sharing/and promotion. This activity involves explaining EBCE to interested parties, recommending EBCE as a viable means to deliver both career education and general education, and providing "psychological" support and encouragement to those looking for options. It includes presenting overviews of both the total EBCE concept of experiential learning and also the four EBCE models.

   A state broker will be responsible for making EBCE presentations at conferences, using existing information resources from the NIE national brokerage effort as a start. The state might also develop a slide/tape loan library, awareness materials and descriptions of services available within the state to be provided to local constituents by the state broker.

2. Assessment of needs, interest and commitment . Before the broker can point a local adopter in the right EBCE direction, the adopter may need specific assistance in decision making: how to identify student, parent and community needs; how to define new state education directions and/or mandates; where to find supplemental funding for program planning, if needed. The ability of the broker to help districts proceed in an orderly fashion in planning for change is critical.

3. Selection of appropriate EBCE model. The broker should be able to help match the LEA's perceived goals with those of EBCE and assist the district in selecting the EBCE model and/or strategies most suitable for the district. In helping an agency or district find the model most suitable to local needs, the broker must suggest ways to put the initial analysis of needs and desires into a plan of action.

   A knowledgeable broker will be able to help customize local EBCE plans to capitalize on the strengths and unique features of the various EBCE models.

   Increasingly, this will involve helping local schools not only gain insight and knowledge about the use of EBCE but also plan for coordination of EBCE with other career education activities in that school or district--both ongoing and those planned for the future.

To these we have added a fourth important service--putting districts in touch with actual resources to assist with their next steps in program planning.

Broker characteristics.

The success of state network brokering rests on the commitment of the broker to EBCE and his/her skill in obtaining visibility and generating teacher/administrator interest. The effectiveness of brokering in each of the five states appeared to be largely dependent on whether brokers exhibited the following characteristics and abilities:

- Being convinced of the usefulness of EBCE; having solid information about the various ways EBCE can be used to meet state educational needs and being able to present the idea persuasively to interested educators

- Being aware of the important formal and informal linkages and communication channels in the state and having the skill and contacts to develop ways to tap them

- Being able to convince others that the EBCE model is flexible enough to meet educational needs in various areas--gifted and talented, handicapped, migrant education--and adaptable to meet specific, local conditions

- Having the support of his/her educational agency for all of the above and being able to devote time to brokerage tasks.

These characteristics, moreover, were important regardless of whether brokering occurred at the state department or local levels.

The activities of brokering.

In each of the five states, brokering activities were organized and conducted somewhat differently. In four of the states, the state strategy coordinator acted as the primary EBCE broker. These coordinators were trained to give overview presentations in all four EBCE models and introduced to training materials made available by each of the laboratories. Two of the states also have one or two additional state agency individuals trained as brokers. A third state has trained* at least six regional service district staff in brokering and the fourth state has used a combination of seven EBCE staff members and regional service staff to provide statewide brokering services. The fifth state is carrying on an informal but highly effective and organized brokering activity staffed solely by local EBCE project staff.

Thus, states surveyed have used a variety of approaches in training state and local educators to be brokers. First-round state strategy states primarily used state department and regional service district staff to advance the concept. Second-round states focused on training EBCE and regional service staff to advocate the program. The "grass roots" state used only local staff to extend awareness of EBCE to their peers.

Each of the five states has taken its own approach to the major issue of systematically spreading the word about EBCE. We have already mentioned the use of statewide newsletters, media coverage in newspapers and articles in business and education publications as strategies used to generate awareness of EBCE in all five states. Awareness sessions were made to professional conferences for counselors, career and vocational administrators and other educators. In addition, four of the five states hosted EBCE conferences to acquaint district teachers and administrators with EBCE concepts and let them see EBCE programs in action. Several states have also held awareness sessions for staff in various SEA departments so that they are knowledgeable about EBCE as they work with local districts.

A number of the states in this group have also collaborated with university staff to offer summer classes in experience-based learning. These classes have attracted teachers unfamiliar with EBCE as well as those preparing to operate programs. The courses urged participants to develop plans for implementing experience-based learning strategies in their own situation.

Outreach plans in one first-round and one second-round state have included developing specific materials to help teachers become aware of statewide EBCE development and programs. These materials include general brochures, a packet of more indepth information for helping in

*Appendix A contains a summary of the total training certification process used by NWREL to prepare individuals to fill all network functions for the NWREL model.

planning, a teacher developed Project Ideabook and curriculum guides for adapting EBCE to junior high students.

District response to brokering.

Although considerable variation has existed in districts responding to brokering, the interactions in a functioning broker system can be summarized this way:

1. Interest is sparked within a district--
   - because of SEA promotion,
   - because of other sources of information (e.g., regional service centers, newsletters, word of mouth from districts with EBCE, National Diffusion Network representatives).
2. Awareness information is sought from the state agency or other broker--
   - through a visit to a demonstration site
   - through an SEA-sponsored presentation
   - through individual consultation with the state broker.
3. The state agency directs the district to appropriate resources for planning and training.
   - The State Department counsels its districts concerning the appropriateness of EBCE or its components.
   - The State Department directs the district to one or more of the following:
     a. university for workshops on selected EBCE strategies
     b. university instructor, regional service center or EBCE for total model training
     c. demonstration site for more information.

It is important to note that many of the outreach strategies have cost money (newsletters, workshops, materials, staff time) but that expenditure of money has not been a prerequisite for effective brokering. In the "grassroots" state staff a major regional conference was organized by university and EBCE who then sought and received state assistance in printing brochures and mailing materials. The important point in their experience is that although "low budget" brokering may be more limited in the number of general contacts made or the frequency of awareness presentations, it may produce equally effective results. It can work if guided by skilled and knowledgeable leaders.

Program Planning: Helping Districts Implement EBCE

Awareness of EBCE is the first step, but without individualized program planning few operational sites would emerge. In developing a state training capacity, NWREL model builders urged the creation of a cadre of trainers to provide specific planning assistance to interested districts. Their tasks included helping local schools deal with issues such as:

- Understanding the EBCE curriculum and how it relates to in-school offerings.
- Answering questions about effectively using community sites for student learning and arranging for transportation and student insurance.
- Organizing community experiences to provide for full academic accreditation.

The information presented during the planning stage often comes during a period of staff and administrative decision making. For that reason, the planner needs to be skilled in facilitating discussion, communicating enthusiasm for the program's potential, helping staff determine an appropriate sequence of planning steps and helping staff decide whether or not to implement EBCE in the first place. The "planner" role in state strategy has involved the following:

1. Conducting in-depth program presentations to administrators and potential EBCE staff members.
2. Leading a discussion regarding what existing district needs can be accomplished by implementing EBCE.
3 Demonstrating how to meet specific course requirements through EBCE's individualized projects.
4. Answering questions on issues related to coordinating an alternative, individualized, community-based program with traditional curriculum--particularly credit, grades, program entry/exit procedures, recordkeeping and scheduling and relationships with school staff.
5. Helping participants plan strategies for recruiting students, community sites and individuals, and activating a community advisory group.
6. Describing transportation, facility and insurance needs, and helping participants decide on how they can provide these for their program.

7. Explaining the responsibilities of staff roles and considering alternative ways of carrying out program staffing.

8. Aiding staff in compiling a timeline of tasks that staff and administrators will need to accomplish before staff training begins.

9. Assisting staff in arranging for and coordinating staff training.

All five states have individuals who are formally or informally identified as planners. Many of the individuals who completed broker certification* have either been certified as planners or are completing the certification. Four of the states have certified planners, with the number of individuals trained varying from one to five.

A critical question for the planner in any state has been identifying planning grants or financial incentives to offset program start-up costs. Districts have often needed financial assistance during the planning phase and have benefited from it during initial organization. State coordinators and planners have worked to uncover sources for planning assistance. Those that have proved available include Title IV C, the National Diffusion Network and resources targeted to special learner needs (e.g. special education, migrant, gifted and talented).

Training Staff and Trainers: A Capacity-Building Plan

Building a locally based, on-going capacity to train new staff in EBCE is the primary objective of the state strategy. As was mentioned earlier in this paper, EBCE state strategy's focus was to transfer training from the original laboratory staff to certified trainers in as many states as possible. In doing so, it would build a solid and perhaps even "institutionalized" base to support long-term expansion of EBCE programs. Without a state training component, new EBCE programs would lack competent, skilled trainers to prepare staff to implement EBCE strategies.

In each state, then, there was a thrust to develop a two-level training capacity. At the first level the state strategy coordinators themselves were expected to develop expertise in providing EBCE awareness, planning and staff training. On the second level, these coordinators would in turn build a training network which would be broad enough to effectively provide statewide training to new EBCE programs.

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* Certification means that appropriate staff at a laboratory where a particular EBCE model was developed have observed the broker, planner or trainer in action, and have determined that he/she can effectively represent that laboratory's EBCE model.

To accomplish the second level, all four laboratories developed criteria for ensuring that EBCE trainers were fully prepared to train others. For NWREL certification, trainers were required to complete the same steps as specified for brokers and planners. But in addition, potential staff trainers co-conducted a NWREL staff training session with a certified trainer and then independently conducted another staff training session while being observed.

Each of the five states devised a specific state training design that ranges from centralizing training in the state education department to concentrating it in the hands of local EBCE staff. The following chart illustrates the different state arrangements:

EXAMPLES OF THE LOCUS OF TRAINING CAPABILITY

	State Educational Agency	Regional Educational Agency	Local EBCE Staff Members
Category I:			
State A	X	X	
State B	X		
Category II:			
State C	X		X
State D		X	X
Category III:			
State E			X

In each state, a minimum of two individuals have been prepared in the NWREL model. States B and E have the smallest number of individuals prepared to carry on EBCE training tasks, while states A and C have carried out the most extensive certification activities.

State B has concentrated on developing a training capability at the state level--in the Department of Education. Training has been viewed as a continuing responsibility of the state education agency and few regional or local EBCE staff members have been engaged by the state coordinating office to augment its staff training capacity.

However, concentration of training services in one locality has had disadvantages as well as advantages. It did provide the opportunity to monitor carefully any training conducted within the state and allow for a coordinated approach to providing services. But it also resulted in

narrowing the base of available trainers by not formally including EBCE staff into training teams. In the long run, this may interfere with providing as extensive and diverse a training capability as possible.

State A on the other hand has developed a cadre of trainers in regional service centers throughout the state as well as preparing trainers at the SEA level. This state has a thorough system of service district staff with primary responsibility for assessing district needs and recommending alternative programs. Since these individuals are in frequent contact with local districts, the coordinator used this structure to develop an ongoing training capacity. All four EBCE models are represented among the EBCE trainers and a total of about 15 trainers have completed or neared completion of the training cycle.

State C has developed a system of training individuals at both the SEA and local levels. In this state, resource training teams are being used to provide start-up training to new EBCE staff members. This option operates in consort with strong central coordination of training and effective utilization of local training resources.

State D has used a training system which emphasized training EBCE staff to fill staff training needs. However, in this state an informal training network with extensive experience but no lab certification has been as much of a training resource as the formal network. The state coordinator is apprised of all qualified trainers in the state and refers local requests to the closest resource.

State E has a training capacity located solely in the hands of local staff. These individuals currently provide coordination of all EBCE activities and offer training to districts interested in the EBCE programs. Although these trainers have not completed official certification, they are amply qualified to carry on the training role and aid in implementing new sites. Only staff responsibilities may hinder them from carrying out as diverse training approach as may be developed in other states. But their organized and economical approach to dissemination plus the benefit of having ready contact with peers may prove to be a particularly valuable and effective approach.

In conclusion, all five of these states have succeeded in preparing a cadre of state EBCE trainers and have attempted to build the capacity to carry on EBCE training on a relatively low-cost, statewide basis.

Demonstrating EBCE in Action: The Role of Demonstration Sites

The heart of a state network lies in a number of good demonstration sites. They allow administrators, teachers and community representatives to interact with staff and students, to review program costs and organizational requirements and to assess personally how the program fits

local needs. As one state coordinator described it, "...what made the difference in the adoption or rejection of EBCE as a viable alternative was the experience that took place at the demonstration site."

Each state relied upon demonstration sites to provide a close-up glimpse of a model EBCE program in operation. Similarily, each state worked out different arrangements to involve demonstration staff formally or informally in the state training network.

Not all EBCE sites in a state were assigned demonstration site status. Involvement in EBCE networking principally occurred among sites which had (a) adopted a complete rather than a modified EBCE model, (b) agreed to host visitors, and (c) provided released time for staff to train others. In one state a written agreement was developed between the network and the site, spelling out services that the demonstration site would provide and support that the network would offer in return. The majority of the states, however, had informal arrangements in which the sites managed the visitation and training requests primarily in response to their own scheduling and programming demands. In some situations, state strategy coordinators arranged visitations; in others they simply referred interested educators to the closest demonstration site. Even in the states where the majority of requests were funneled through the state coordinator's office, many other requests were managed solely by the site itself. A closer look at the states represented in this survey indicated the following:

- State A identified two sites as primary demonstration programs. Selection of these sites was based on their demonstrating a complete EBCE model, being established long enough to smooth out program operations, and involving a racially mixed and an academically balanced student group. In practice, however, nine out of eleven program adaptations in the state also operated periodically as demonstration sites. Not all usage was coordinated through the state coordinator's office. The state coordinator from State A strongly advocated full use of sites for visitation, acknowledging that there was real value in having a range of available sites, representing a variety of school district sizes, student populations, resources and varying degrees of EBCE adaptation.

- State B was the only state that formalized agreements with its demonstration sites. The agreement specified expectations regarding awareness and staff training sessions to potential EBCE implementers. Demonstration site staff in this state were also trained in planning and staff training and were called upon to do state EBCE training. The State Career Education Resource Bank covered training costs. The seven available sites provided a variety of opportunities to view EBCE adaptations in action (not all NWREL models).

- State C had sites in six separate communities with NWREL and Far West Laboratory models represented. Most sites were established through VEA-Part D grant monies. Two sites were community college adaptations and the remainder served junior and senior

high school students. All sites with Part D funding were required to be used for demonstration. In this state the coordinator played a primary role in arranging and organizing site visitations.

- State D had the NWREL model represented in four communities. This state also had one of the four original laboratory demonstration sites as well as a Part D funded site. As a result of the demonstration site having a strong dissemination component, this state tended to have a more diffused and independent operation of the demonstration sites. In this state, the demonstration sites took a lead role in coordinating awareness presentations and staff planning and the state coordinator primarily referred individuals to site directors to arrange independently for training.

- State E operated principally with "grass roots' EBCE coordination. Directors and staff from two EBCE sites with Part D funding arranged for state awareness and training sessions. With limited staff time available for training, staff found it most effective to coordinate several major visitations and conduct presentations for 60 or so individuals at a time.

Clearly, no single means of handling demonstration site usage has been implemented across all states. Each state has devised a system that use its resources and leadership as effectively as possible. Of particular importance in making maximum constructive use of sites has been having--

- A state coordinator with indepth knowledge about each of the state's EBCE adaptations and close contact with site directors and their scheduling preferences.

- A variety of EBCE sites, using different models and funding sources to give potential adapters information on the wide range of program options.

- Demonstration site staff who willingly accommodate visitors into informal presentations about EBCE.

Most effective have been states in which collaboration between the state coordinator and EBCE sites has been established and neither group attempts to monopolize or control the free flow of information nor access to programs.

Evaluating EBCE: Keeping Programs on Course

Monitoring site operations and assessing the level and quality of implementation is a necessary ingredient in state coordination and dissemination. Consequently, state strategy states have built into their dissemination designs plans to carry on the evaluation of EBCE sites within their state. Although evaluation responsibilities had been principally the responsibility of the four laboratories, the process of transferring evaluation capabilities to the states promises to result in providing ready and efficient monitoring of sites and collection of common data among EBCE participants.

Acquiring a comprehensive state-level picture of the impact of EBCE calls for an evaluation system which should include the following:

- Carrying out visitations to the separate EBCE sites and assessing the level and quality of implementation.
- Designing and implementing a system for collecting and synthesizing common evaluation data.
- Providing assistance to program staff in identifying problem areas and program weaknesses.
- Assisting program staff in defining project objectives and the degree to which they are being met.
- Collecting data to demonstrate the level of academic achievement, career skills achievement and attitude changes attained by EBCE students.

In one state an evaluation resource team has been designated to serve as primary EBCE evaluators. Comprised of SEA and local district staff members, this group provides evaluation guidelines and follow-up assistance to districts, prepares necessary reports and disseminates findings.

In another state, the Department of Education views itself as having long-term responsibility for evaluating EBCE. But in addition to plans for developing a state level evaluation team, this state uses a third party evaluator to aid in determining EBCE site effectiveness. The evaluator is responsible for assessing site functioning, aiding programs in evaluating attainment of their objectives, and providing constructive feedback for program improvement. Evaluation instruments have been developed to measure staff development, program implementation and management functions. The collected student data is intended to demonstrate to other schools in the state the level of academic achievement, career skills achievement and attitude changes in EBCE students.

Evaluation activities in the third state focused on a thorough review of Part D-VEA third party evaluation observations and conclusions supplemented by site observations by the state EBCE project director. Emphasis in this state is on formative evaluation with primary concern on providing project staff with useful input for program operations. Third party evaluation was also provided to determine how the network of trainers perceived the total EBCE dissemination effort, and what strategies needed to be used to improve the networking effort. Third party evaluation is a major resource to the state EBCE coordinator and has been used to improve both EBCE program and dissemination activities in the state.

The extent of evaluation activities at sites in the five states varied considerably. States have had the benefit of third party evaluators for the review of Part D-VEA sites, a required program element for all Part D funded projects. Although this has been an important resource, state

coordinators also have needed to devise inhouse means of acquiring data for EBCE program continuation and improvement. In a number of instances, state coordinators have used SEA staff to supplement third party evaluations and have coordinated dissemination of results themselves. Knowledgeable resource people in local staff and university settings now are available to carry out further evaluation needs and EBCE state network coordinators need to be able to refer programs to appropriate evaluation resources.

SUMMARY AND PROSPECTS FOR THE FUTURE

In the preceding section we outlined the essential functions of a state network and how five representative states chose to carry them out. The section was descriptive: It asked what were the original expectations--the EBCE dissemination blueprint--and what, to the observer, seems to have actually occurred.

Throughout the following section we have taken a close look at what payoffs have resulted from state strategy, what movement has occurred toward the institutionalization of EBCE, and what general conclusions can be made about creating effective networks and making them last. In doing so we have asked three important questions:

1. To what extent were EBCE state strategy states successful in developing new EBCE programs?

2. What kind of training capability was developed in the five state strategy states and what are the strengths and weaknesses of each?

3. What are the prospects for state strategy survival in the five states?

Developing new programs

Earlier in this paper we noted that the effectiveness of EBCE state networking should be viewed with respect to the number of EBCE sites actually developed. This is true once a network is established and functioning. However, since the three categories of strategy states discussed in this paper represent different time frames and phases of development, we were reluctant to tally adoptions and invite comparisons among the states. Counting successful adoptions must always be approached first with knowledge about how long a network has been in place.*

Training capability.

The second question asks whether a training capability has been established in each of the five states and the strengths and weaknesses that each seems to have. This question is particularly important since one of the goals of state strategy was to develop a state-based training capacity that would be able to carry out brokering, planning and staff training.

In each state a substantial number of individuals have participated in training activities, but in each respective setting, the network differs.

* A list of all NWREL/EBCE adoptions by state is available from NWREL.

in its scope and in the capability of trainers to carry out the more detailed training functions involved in starting up a new program. The plans adopted by the states, moreover, show a variety of methods for developing local EBCE expertise. Each method has its own assets and liabilities.

State A focused on training regional service center staff members. This approach developed an extensive training network, with at least 15 individuals prepared to implement some aspect of the training program. The majority of these individuals, however, are prepared to do brokering and initial planning; few are certified to carry out any of the training for new staff members. This system allows for extensive brokering of EBCE with primary emphasis on adapting these strategies to fit into existing curriculum approaches. Although there is real strength in incorporating EBCE approaches into regular classroom settings, there is also a limitation in that the emphasis on developing EBCE in its entirety--as a comprehensive alternative approach to using the community--may well take a secondary role. The trained regional staff members, on the other hand, are a substantial asset to a network system, since their frequent access to local districts helps spread EBCE awareness. But EBCE is just one of a number of program solutions advocated by regional staff members, and it is not clear whether these trainers will prove to be strong advocates and persistent supporters of comprehensive EBCE programs.

In State B, a small cadre of state department trainers assumed major responsibility for EBCE awareness, planning and training. Although this state also encouraged staff from the sites to participate in brokering activities, local staff were not viewed as the main long-term training resource for new state EBCE programs. The benefits of this approach have been that the cadre of trainers are knowledgeable, thoroughly trained and hence are able to maintain high quality training throughout the state. But the limitation has been that the small initial number of state department trainers have already moved on to other jobs and their availability for extensive training or planning is limited. To date no new trainers at the SEA level have been prepared to carry out staff training activities and this poses a potential limitation in this state system's training network.

The approach of state C to developing a system of trainers consisted of developing a training capacity in both the SDE and in local sites. In this state local EBCE staff members are the primary training source. There are a number of strengths in this system that are not available in the previous states. First, the majority of certified trainers have familiarity and commitment to EBCE and are trained to carry out more than awareness activities. Second, these trainers are part of a statewide resource bank and funds are available from the state to carry on training, including EBCE training, across the state. Third, this state has retained a full-time state strategy coordinator on a combination of state and federal funds. This individual is certified as a trainer,

able to carry out the training of new staff members as others phase out of the training role, and is also available to spearhead the ongoing advocacy of EBCE programming.

In state D, local EBCE staff members also are the focal point of the statewide training network. This state, however, has a strong informal network of trainers and minimal central coordination. It also has seen some of its most competent trainers moving from public to private sector jobs and thereby diminishing the availability of trained resource people. In this state the lack of central coordination and a fairly small number of certified trainers in the formal training network have been limiting factors. Although local staff have taken on an increasingly active role in establishing EBCE as a program adaptable to a variety of settings, only a very small number of local staff members are involved in training and dissemination activities.

The last state reviewed has strong grass roots leadership. The strength of this network has been in the level of personal commitment of staff to promoting EBCE. In addition, local EBCE advocates have devised a well planned three-phase strategy for brokering and providing planning assistance to other interested educators. Interestingly this state actively with a strong, highly organized informal peer network, has been actively involved in acquiring SEA support and involvement in EBCE activities. The rationale for requesting SEA support is that department staff members have resources that are not readily available to local district staff members and that SEA involvement provides additional visibility and credibility for any training activity or workshop undertaken. So this
state, which initiated its activity through capable peer staff organization, is now finding itself seeking collaborative assistance from the state department to augment the effort of local staff and provide real recognition for EBCE within the state.

In summary then, each state has devised its own solution to the networking concepts of building a local training capacity. The ones that currently seem to be strongest and most effective are based on a collaborative effort between trained, enthusiastic EBCE staff members and centralized coordination from the state department. Central coordination, however, does not mean simply having an individual assigned to the task, but having a person carrying out EBCE coordination who has strong personal commitment to seeing EBCE thrive and grow and a job description that specifies how that will occur. This in combination with having a group of certified or at least thoroughly trained trainers, who continue to be available to train new EBCE program staff, provides what seems to be the most flexible and versatile arrangement.

Prospect for survival.

What are the prospects for state strategy survival in these five states? First-round strategy states, the only group to actually receive funding to develop a state network, came to the end of their funding in 1979. In two states the position of full-time EBCE state strategy coordinator will not be refunded during the coming year and no single individual will have full-time responsibility for managing and coordinating an EBCE dissemination network. In each of the states, however, a state

department staff member has officially been assigned to carry on EBCE dissemination activities. This individual's assignment and responsibilities are naturally more limited than the original coordinator's and consist of providing awareness information and referring interested educators to existing EBCE sites and trainers.

Since this change in staffing has just occurred, it is too soon to be able to assess the effectiveness of these new EBCE state strategy coordinators. However, in both states the solid initial planning and development of the last two years should be an asset to continued program development; it should result in requiring less time from individuals currently assigned to coordinate EBCE dissemination than at the onset of the project. New coordinators in these two states will be able to build on a well-developed system of sites across the state, general awareness of EBCE by state educators, existence of some planners and trainers can help to set up new sites, and an organized approach to disseminating EBCE. With the essential planning for EBCE off the ground, it may be possible for a new SEA staff member to add network responsibilities onto existing but related work assignments.

In the second category of state strategy states those originally receiving free technical assistance but no federal funding, the prognosis for the two representative states differs considerably. In one of the states the signs for continued networking are very positive. A full-time state coordinator will continue to be funded through combined federal and state resources. The coordinator's familiarity with EBCE, the existence of a functioning network of trainers, and financial support for training in the state is a clear-cut "plus" for state strategy continuation in this state.

The second state in this group has an informal dissemination network with minimal central coordination. Although a new State Department staff member has recently been assigned to continue the EBCE dissemination effort, only a minimal number of days have been allocated to the task. This may be an obstacle to continued SEA involvement. On the other hand, one of the original Part D sites in this state has assumed a definite leadership role in continued dissemination, has received state program funding with inclusion of funds for general EBCE dissemination and is active in maintaining EBCE visibility in the state.

In the fifth of our subject states, networking has been primarily a local rather than a state coordinated effort. The major thrust for EBCE dissemination has been generated by local staff members whose active and coordinated efforts to increase awareness of EBCE have brought about State Department interest, support and cooperation. Coordination of the network, however, is still being conducted on the local level by two EBCE program directors. They have successfully planned a three-phase approach to increasing EBCE visibility in the state and have also acquired state monies to continue their dissemination activities. Despite the success of these individuals in developing and using an informal peer network, they have also acknowledged the benefits and desirability of maintaining strong connections and a supportive alliance with State Department staff members. Local EBCE directors point out that the State Department's ready access to funding, information and media assistance is an important ingredient in maximizing EBCE visibility.

What Can We Learn from the State Strategy Experience?

State strategy was a plan to develop a strong and coordinated state-based training and dissemination effort to assure that the educational innovation survives past the conclusion of federal funding. From the experiences in these five states have reached several generalizations about the successes and problems associated with carrying out a state strategy model.

As states organized and carried out EBCE dissemination networks, challenges in the design of the model and in the way states chose to put it into action began to appear. Since these issues provide information on networking in general and may be a resource for future networking efforts, this section of the paper will focus on conditions and issues that either aided or interfered with establishing networks and important considerations for effective networking.

State networks were clearly successful in increasing educators' awareness and interest in EBCE learning approaches. They were, however, somewhat less successful in setting up a long-term EBCE state training capability. Some of the difficulties in establishing an EBCE training network related to factors in the proposed model itself, including the following:

1. Individuals who participated in EBCE training were expected to master the basic EBCE program learning strategies as well as understand the differences in the four EBCE models. To organize this process, the Laboratory's training model proposed a series of certification levels for training others in the details of EBCE programming. Basically, the training model assumed that anyone with interest and motivation could become an EBCE broker or trainer. As it turned out, however, the system was fairly complex and time consuming and many state trained individuals acquired brokering skills, but few acquired enough skill to replicate a total training program for new EBCE staff members.

   In retrospect, it was more difficult than anticipated to train individuals who had minimal familiarity with EBCE to become staff trainers. As a consequence, state networks may be weakened by the limited number of competent staff trainers available for furthering EBCE implementation.

2. The training certification process is fairly lengthy as well as involved.* Teachers and intermediate service agency staff frequently had difficulty in getting sufficient released time to attend and complete the training cycle. Consequently, many potential trainers failed to acquire the certification. For individuals with either a basic or a thorough knowledge of EBCE, learning techniques for organizing and presenting the EBCE material were essential. But the time factor as well as the need

to verify an individual's understanding of EBCE were problems and suggest that a simple training process that builds on existing program knowledge may well be an essential ingredient for success.

3. The training system had no built-in provision for training new trainers as old ones took on new assignments. Consequently, even in the span of three years, more than one state encountered staff turnover which diminished the number of available trainers in the state. Networks which have only a few key trainers and have not devised a simple way of adding new potential trainers face difficulties.

Recommendations.

Based on these factors, future networks may need to take into consideration the following recommendations. First, training networks should identify and involve the most qualified and knowledgeable personnel available. This may often mean relying on existing program staff members to become the mainstay of the training system and directly funding EBCE programs to carry on dissemination activities. Second, the training model should be as simple as possible and provide for a way of bringing new trainers into the system as experienced ones leave. Third, the training network must build in a system of recognition and reward to provide incentives for individual participation. Without individuals receiving either professional rewards, monetary benefits or opportunities to carry out a personal commitment, there is little chance that they will continue to be involved in the training network. A number of the states surveyed gave minimal consideration to the incentives needed to encourage EBCE staff trainers to continue participating.

Difficulties that states encountered in carrying out the training network can be summarized as follows:

- The training design could be best realized by involving individuals with prior knowledge of EBCE. It turned out that the training plan worked well in preparing brokers but that it was too demanding and time consuming to prepare those who were unfamiliar with EBCE to become skilled trainers themselves.

- The training required a substantial time commitment from individuals. Few managed to schedule in the number of days required to complete the entire training sequence.

- There were no real provisions for replacing trainers in the network as others moved into different types of jobs and commitments.

We learn from this that there can be a real advantage in capitalizing on the existing informal network in a state, and some definite drawbacks in attempting to create a totally new network, developing it from the ground up. We also note that time is a critical element in maintaining individuals in the training system. If it demands too much time or

*The NWREL model had four levels of certification, with time required for completion varying from one to three days. This certification process is described in the appendix.

detail, individuals are less likely to stay with the effort. Also, if they have no particular incentive for being in the network or no real commitment to the cause, the chances of long-lasting participation are less likely. In the state with one of the most viable state networks the following occurred: It trained local EBCE staff members; it identified monies that could be used to carry out the training in other districts; it had a state coordinator who was capable of training new trainers; and it provided recognition to trainers by involving them in a statewide network of trainers. These elements seem to be important factors in developing a functioning training network which can set up new programs as well as broker the EBCE concept.

Looking back, certain conditions existed that seemed to help our sample networks succeed. One of the most critical was the existence of strong leadership. For state coordination to be effective, the coordinator had to be more than a figurehead with report writing responsibility. If the network is to run smoothly, the coordinator needs the following: direct access to power at both the state and local level, discretionary control over some budgeting items, a job description which specifies that the individual's major work responsibility is to make the network visible and effective. In addition to these, certain characteristics seemed to be particularly important in the selection of leadership for state strategy. As was mentioned earlier in this paper, the individual has a greater chance of succeeding if he/she is viewed by peers and superiors as credible, knowledgeable, a reliable information resource, and informed about latest program developments and funding sources.

Above and beyond that, the coordinator must be enthusiastic about the educational options provided by experience-based programs. A review of these five states also points out that the effectiveness of the coordinator will be largely determined by the degree of encouragement provided by the SEA. Consequently, a potentially strong leader placed in a setting where he/she gets little positive feedback or recognition from the work will soon be demoralized.

Therefore, if the coordinator for state strategy is to be part of the State Department of Education, the SEA must be willing to support the position and reinforce the objective of EBCE dissemination. If strong advocacy does not come from the SEA then leadership will have to emerge from local programs. This then raises the question of whether a statewide dissemination network can exist and prosper without formal leadership or coordination. If we draw conclusions from these states, networks can and do exist informally but they may not necessarily become very solid without the additional support of responsible and centralized leadership. This does not mean that EBCE cannot be disseminated effectively by informal networking. On the contrary, strong peer advocacy of an innovation fosters program adoption. However, the states with effective state level coordination had assets not available to those with local leadership. These include:

- access to resources and contacts at the federal and state level, not readily available to participants in informal networks

- information on state or federal financial resources available for EBCE planning and program implementation

- consistent attention to coordinating and organizing brokering, planning and training activities for local districts.

This raises the issue of whether an informal network can be just as useful and strong as an organized network with emphasis on state coordination. The ideal arrangement is to have a strong local network and lots of advocacy for EBCE in the districts, augmented by an active state coordinator. Having a person in a central position, whose job responsibilities include the continued growth and success of EBCE programming in the state, can clearly work to the benefit of the innovation's continued acceptance and recognition as an instructional strategy. Moreover, it is important to note that there were benefits in the states where a formal attempt was made to set up a state network and a person was actually hired to do the job.

The EBCE state strategy effort was an attempt to move a major educational innovation across the nation and transfer the advocacy and training functions from regional laboratory staff to agencies closer to students.

The process had positive results. It increased awareness of EBCE at the state level and in local settings; it fostered the development of new sites; and it resulted in creating cadres of qualified trainers. Its successes and shortcomings help us come one step closer to finding effective ways to get new educational practices to where they matter most--in local communities and schools.

APPENDIX

NWREL EBCE Certification Process

Necessary Functions in a State EBCE Network

In working with states to develop EBCE state networks, NWREL has identified seven functions that need to be performed in order to have an effective state network that operates entirely independently of Laboratory assistance. These seven functions are:

1. Coordination/leadership of the statewide effort
2. Brokerage of the EBCE concept to interested audiences
3. Program planning with districts deciding to adopt or adapt EBCE
4. Staff training and in-service for teachers operating the new EBCE program
5. Training of consultants/trainers to perform functions 2, 3 and 4
6. Demonstration of EBCE through operating program sites
7. Evaluation of state network efforts and of operating EBCE programs

For three of these functions--coordination/leadership, demonstration, and evaluation--NWREL has established no formal training and certification process. However the Laboratory has assisted in the development of these functions with both materials and consultant assistance.

The function of coordination and leadership is crucial to a well-established state network. The NIE letter announcing the second-round state strategy competition stated that, "It is also critically important that responsibilitiy for this project be assigned to an individual sufficiently senior and knowledgeable to be familiar with SEA operations and mechanisms for innovation dessemination." This individual is ordinarily a person at the State Department of Education who is already performing a career education dissemination function. Thus EBCE becomes another program service they coordinate in the state. To assist these state EBCE coordinators in planning and establishing their networks, the NWREL staff consultants have provided them initial consultation services in the network planning stage, a copy of the paper entitled "How a State Model Might Work to Institutionalize EBCE," and ongoing assistance in implementation of the plans. Further guidelines for new states developing such networks will be developed based on the experience of those currently doing so.

The function of demonstration is provided by operating programs within the state or region. Working agreements between the state coordinator and the sites for this service can be modeled on the NWREL pilot site agreements if the state so desires.

Guidelines to EBCE program evaluation are available in Volume 5 of the EBCE Handbooks. Evaluation of the state network would ordinarily be accomplished within the framework of an SEA's overall evaluation of its goals.

The state can play a very important role in the evaluation of EBCE. This role can result in improved evaluation of individual EBCE project sites within the state as well as the operation of a minimal common data base across EBCE sites within the state, so as to provide a picture at the state level of the impact of EBCE. To achieve both of these purposes, it is essential to have a trained evaluator within the state who is knowledgeable about ways to evaluate EBCE effectively. This person could:

- serve as a consultant to evaluators at the local district level who are evaluating an EBCE program
- coordinate periodic workshops throughout the state for evaluators who are working with EBCE to allow them to exchange ideas and approaches
- visit the separate EBCE sites within the state to assess the level and quality of implementation
- design and implement a management information system that would collect and synthesize a limited amount of common evaluation data across EBCE sites within the state

The NWREL role in this evaluation process is to be available on request to consult with a person who would coordinate the EBCE evaluation activities within the state.

Functions Requiring EBCE Training

The four remaining functions--brokerage, program planning, staff training and training of consultant/trainers--are the ones specific to EBCE processes, program installation and information. For these functions NWREL has developed specific training activities, described in the EBCE Trainer's Handbook, and a certification process, described in this present document.

The EBCE Trainer's Handbook is used by experienced trainers as a guide for workshops in the skills and processes unique to EBCE prgorams. In order to provide a consistent framework for identifying those individuals considered sufficiently prepared to assume the consultant roles for functions 2 through 5, NWREL has developed the following procedures as a

guide for preparing and certifying individuals. The certification procedures for each function consist of a sequence of recommended activities or steps for preparation (see attachment A) and a set of essential certification criteria (see attachment B).

How an Individual is Certified

States that wish to acquire an EBCE capability in any or all of the certification levels identify the individuals who will participate in the necessary preparation activities. For each individual thus identified, the state EBCE coordinator also identifies what is (are) that individual's certification goal(s)--broker, planner, trainer or trainer of consultant/trainers in any of those three levels. NWREL then informs the state coordinator and the individual of the requirements for certification. As opportunities arise for these individuals to participate in various preparation events, the NWREL staff or the state coordinator informs them. (See Attachment A, Steps to Follow, for a brief description of each of these certification levels.)

As individuals progress through the preparation steps recommended on Attachment A, the NWREL staff members log their activities. When an individual has completed the preparation steps and has demonstrated satisfaction of the certification criteria to a NWREL trainer, the NWREL staff member writes a summary of that individual's accomplishment and recommends certification at the appropriate level. This recommendation is submitted by memo from the NWREL EBCE training coordinator to the EBCE program director. If the program director agrees with the recommendation, NWREL then notifies the agency's person in charge that the individual has been certified. (See Attachement C, Sample Certification Letter.)

Certifying Trainers of Consultant/Trainers

An individual who has been certified as capable at a given level (broker, planner or trainer), and then wishes to be able to train and certify others at that level, must take one additional step. The NWREL staff member makes certain the certified individual can explain the preparation and certification process and can apply the certification criteria. If so, the NWREL staff member would recommend this person be certified as trainer of brokers, planners or trainers. If the program director concurs, that person could then train and certify others at that level.

In the case of this second-generation certification the agency with whom the certifying individual is affiliated would need to devise its own notification format. The certification would then come from that agency, not NWREL. At this point NWREL will have turned over its training and certification responsibilities in that level to the state or agency involved. When a state has certified trainers of brokers, planners and trainers, the EBCE network in that state will be self-sustaining.

Steps to Follow for NWREL EBCE Certification

	RECOMMENDED							ESSENTIAL					
	Participate		Co-train		Train under Observation		Visit	Satisfy Certification Criteria					
	Awareness Session	Staff Training	Program Planning	Staff Training	Program Planning	Staff Training	Demo Site	Broker	Trainer of Brokers	Planner	Trainer of Planners	Trainers	Trainer of Trainers
BROKER Conducts awareness level presentations on EBCE, assists interested districts with program analysis. (See Program Analysis section, Trainer's Handbook.)	X	X	X				X	X					
TRAINER OF BROKERS Trains and certifies EBCE brokers.	X	X	X				X	X	X				
PLANNER Assists committed district in designing and planning for an EBCE adaptation suitable to their needs and goals. (See Program Planning section, Trainer's Handbook.)	X	X	X		X		X			X			
TRAINER OF PLANNERS Trains and certifies EBCE planners.	X	X	X				X			X	X		
TRAINER Conducts staff training for EBCE staff members, with adaptations as appropriate to the district's program plan. (See Staff Training section, Trainer's Handbook.)		X		X		X	X					X	
TRAINER OF TRAINERS Trains and Certifies EBCE trainers.		X		X		X	X					X	X

CERTIFICATION CRITERIA FOR NWREL EBCE

Broker Certification Criteria: Ability to conduct specifically all activities described in NWREL Program Analysis section in Trainer's Handbook; more generally speaking, demonstrated ability to perform the following:

1. Facilitate discussion as to what identified need prompted agency's investigation of EBCE and how they see EBCE meeting that need.

2. Conduct a Program Overview presentation (as described in Handbook) pointing out elements with potential for meeting identified needs.

3. Execute, with participants' help, a preliminary match up of identified needs and EBCE program elements, including seeking answers to questions regarding anticipated funding source, target student population and length of student enrollment in program.

4. Compile with participants a list of questions for which they must seek answers from their administration.

5. Arrange for and coordinate participant visit to operating EBCE site.

6. Help participants determine desirability of pursuing EBCE for their district; if affirmative,

   a. review decision-making process/hierarchy at their school

   b. plan with them how to answer questions compiled in item 4 above

   c. prepare tentative plan for presenting their recommendations to deciding body for adapting EBCE to meet their needs.

7. For all of the above, respond to questions either with informative answers or with a reference to a suitable information source.

8. Satisfy additional nine criteria of General Training Skills, p.5 of this attachment.

Planner Certification Criteria: Ability to conduct specific activities described in NWREL Program Planning section in Trainer's Handbook; more generally speaking, demonstrated ability to perform the following:

1. Conduct a Program Overview presentation, adapting to the level of participants' prior knowledge of EBCE and presence of individuals other than EBCE staff.

2. Lead a discussion as to what their district hopes to accomplish by implementing EBCE (i.e., what needs will EBCE address) and plot (on a grid if appropriate) how EBCE strategies could address their needs and objectives.

3. Demonstrate how to document specific satisfaction of identified course goals through adaptations of EBCE processes and materials.

4. Facilitate a discussion on questions and issues related to coordinating an alternative, individualized, community-based program with a traditional curriculum, particularly credit, grades, program entry/exit procedures, related recordkeeping, and relationships with school staff and scheduling.

5. Help participants plan strategies for recruiting students, community sites and individuals, and establishing a community advisory group.

6. Assist participants in analyzing their need for various types of assessment data, both for evaluative and student learning purposes, and in planning what instruments, people and procedures they can use to obtain that data.

7. Describe the need for transportation, facilities and insurance, and help participants brainstorm how they can provide these for their program.

8. Explain responsibilities of each staff role as it relates to students, the community and to EBCE staff team; discuss alternative ways of combining roles and functions and help participants develop their own position descriptions.

9. Wrap up the program planning session by leading the group in reviewing and compiling a timeline of tasks staff and administrators will need to do before the staff training session and before program start-up.

10. For all of the above, respond to questions either with informative answers or with a reference to a suitable information source.

11. Satisfy additional nine criteria of General Training Skills, p. 5.

Trainer Certification Criteria: Ability to conduct specific activities described in NWREL Staff Training section in Trainer's Handbook; more generally speaking, demonstrated ability to perform the following:

1. Conduct a Program Overview presentation, adapting to the level of participants' prior knowledge of EBCE and presence of individuals other than EBCE staff. Presentation to include:

   a. explain each curriculum component and related learning strategies
   b. explain how each learning strategy is individualized
   c. list and briefly describe in quantity and quality program completion requirements and how these are interrelated

2. Explain responsibilities of each staff role as it relates to students, the community and to EBCE staff team; discuss alternative ways of combining roles and functions to form new staffing configurations; assist participants in delineating their staff responsibilities.

3. Explain and lead a discussion of the guidance/accountability system; give examples; respond to questions; demonstrate negotiation of a guidance contract with a student.

4. Explain the three kinds of projects:

   a. life skills learning objectives → prewritten project

   b. life skills learning objectives and LSAF objectives → learning project

   c. life skills learning objects + individual interests + needs → individual interest project

   Be able to give examples in response to questions. Demonstrate the development of a project in any life skill area for a specific student. Lead participants to evaluate the quality of their projects.

5. Adequately demonstrate a site analysis interview and completion of an LSAF within an hour, and then instruct how to write related student learning objectives.

6. Demonstrate how to recruit community instructors and competency certifiers illustrating how to communicate the special characteristics of EBCE, how this affects what we want resource people to do, and how it relates to what students will do.

7. Explain the collection and use of assessment data on students.

8. Explain concept of negotiation and negotiate a project with a student demonstrating items on the negotiation checklist.

9. Lead a discussion of individualized evaluation and grading, and demonstrate the process of evaluating a project with a student.

10. Explain the original recordkeeping system, and discuss possible adaptation.

11. Explain the EBCE survival skills/competencies, their purpose, their development at local sites and the certification process.

12. Clearly describe and delineate the unique characteristics of and the relationship between an Exploration, a Learning Level, a Skill Building experience, and a Special Placement.

13. Satisfy additional nine criteria of General Training Skills, 5.

GENERAL TRAINING SKILLS
CRUCIAL TO EFFECTIVE IMPLEMENTATION OF EBCE IN NEW SITES

1. Listen to local needs and summarize accurately.

2. Facilitate discussion among the staff that results in common understanding.

3. Meet or satisfactorily adapt the staff training schedule while also meeting the local needs of the group.

4. Explain EBCE Handbooks, Trainer's Handbook and other materials as appropriate, and facilitate participants' effective use of them to perform activities in session.

5. Give examples of variations and adaptations from sites.

6. Respond with creativity and flexibility to questions and concerns of participants.

7. Demonstrate all the EBCE processes appropriate to the session being conducted.

8. Exemplify in the manner of conducting the sessions the EBCE concepts such as participation, individualization and cooperation.

9. Help the group bring the session to a productive close with a compilation of tasks to be done.

Dear

The following person has satisfied the evaluation criteria and been recommended for EBCE certification by our Training and Technical Assistance staff in the roles or levels listed below.

Certified Individual: Myrna Macdonald

Date Certification Recommended	Levels of Certification	Associated EBCE Activities
10/77	Broker	Conduct awareness sessions and program analysis, as described in the Trainer's Handbook
10/77	Planner	Assist education agencies in planning an EBCE program adaptation appropriate to local conditions, as described in the Trainer's Handbook
11/77	Staff Trainer	Conduct initial staff training activities, as described in the Trainer's Handbook, and provide follow-up technical assitance as requested
10/77	Instructor, Experience-Based Learning class	Design and instruct a college level class for teachers in experiential learning concepts and practices
1/78	Trainer of Brokers, Planners, Staff Trainers and Instructors	Train, evaluate and certify Individuals as EBCE Brokers, Planners, Staff Trainers and Instructors according to NWREL certification process and criteria

This letter confirms that she has the endorsement of NWREL to conduct the EBCE activities appropriate to the levels designated above.

Yours very truly,

Larry McClure, Director
Education and Work Program
LM/lt